

Message

From: Purnima Kochikar [REDACTED]@google.com]
Sent: 10/11/2018 2:42:56 PM
To: Adam Gutterman [REDACTED]@google.com]
CC: Lei Zhang [REDACTED]@google.com]; Mike Marchak [REDACTED]@google.com]
Subject: Re: HI-po/hi-risk AAA/Indie coverage

Our emails crossed.

Adam, completely agree with your assessment. I believe devs are making prudent decisions for their business. Our goal is to address misconceptions if any, with the dev, and with Google leaders. Where there is opportunity for the dev, we need to lean in, even if it means we need to take extraordinary steps to help with testing etc.

I also want to point out that we should not conflate games launching first on iOS to be a risk to Android. Premium games have ALWAYS launched first on iOS and do significantly better on iOS. Previously MOST apps and games launched first on iOS, as we closed our technical debt (in those days FOPS, payment etc), sim ship increased steadily.

The Bear Hug effort is to address fragmentation WITHIN the Android ecosystem. We are unlikely to be able to Bear Hug our way out of the technical debt when compared to iOS. For example: I don't think Civilization VI will work on Android as it is currently. It is 2.5x the size of Fortnite, starting price is \$23.99, and has in app items which are around \$10. For this to work, we not only have to pay down the tech debt on Android, we need to implement a lot of the premium gaming features contemplated by Greg and Tian.

This is not to suggest that we sit back. We should definitely jump in and do the assessments and have a pov. We should definitely chase down the games that are viable. We should also be okay with some not coming to Android, because a disappointed dev is worse than not having the game on Android. And under all circumstances, we must actively address fragmentation of the Android ecosystem.

Hope that helps.

P

EXHIBIT 1520

On Thu, Oct 11, 2018 at 7:28 AM Adam Gutterman <[REDACTED]@google.com> wrote:

Just wanted to add some color to the expectations around sim-ship here, which will be in the challenge in the near term. Some considerations:

- We're still digging out from Android tech debt. If we land the first bits of the Games SDK, Device Cert, and the initial phase of updateable drivers, we should be in a much better state in ~12 months. Still, we're at least 2-3 years from making Android a predictable platform to build games for.
- While DevRel can parachute into studios to help them get over the finish line, their resources are extremely limited. Additionally, given the aforementioned technical debt, there's very little 1-2 DevRel heads can do to close the gap. Tencent, etc. can do this with sheer HC (50+) but we simply aren't (and shouldn't be) instrumented to do this.
- We've hired an eng director to manage Android Games and Graphics (starting early November!), who will also hire out a DevTech team to work with developers, but this HC is months away from realistically landing.
- As has been stated prior, developers are making a sensible economic decision by shipping to iOS and then Android in sequence. To help drive sim ship, Android Eng will continue to work on mitigating the cost side of the equation (as noted above), while Play can influence the equation here in two ways:

- Earlier outreach, so we can scope the gap and resource against it in time.
- Increase Play outcomes (Bear Hug)

On Wed, Oct 10, 2018 at 11:48 AM Lei Zhang <[REDACTED]@google.com> wrote:
Hi Purnima:

As you know a few of us started working on identifying hi-po/hi-risk AAA and independent developers two months ago. This ties well with the bear hug initiative. But recent development of the industry indicates the trend is moving faster than we thought and the risks are imminent. In particular:

- AAA franchises launch on mobile that we need up-level engagement to provide white glove support:
 - Bethesda: Elder Scrolls
 - 2K: NBA2K
 - EA: Command & Conquer
- AAA franchise launches in 2019 with significant risk of no-simship or even off Play:
 - Activision: Call of Duty
 - Blizzard: Diablo (Blizzard raised the question of rev share this week)
 - Riot: League of Legends
- AAA or Very high-profile independent developers' upcoming launches we currently don't have adequate coverage
 - Aspyr: Civilization 6 (as raised by Sameer)
 - Stardew Valley (as raised by Tian)
- JP team has a separate risk assessment but at least we have good coverage there

It's reasonable to expect more imminent risks coming from our list and out side of our list.

We are already in the process of urgently assigning some accounts with immediate risks to BDMs. But I think we need a more structured approach/program to address the issue. The program will consists of:

- Formal vetting the hi-po/hi-risk list for completeness and priority (as you know this was done as a side gig by some of us), and create an early warning system based on this
- Initiate or up level coverage based on the list and priority; understand & track risks of each developer and develop mitigation
- Create offers/package for developers based on priority and formulate AAA/Hi-po Indie playbook
- Pitch/Negotiate with devs to ensure on-Play and simship
- Support launch

All of the above requires very systematic, structured work and follow through. I propose for Eleanor to lead this.

Please let me know your thoughts.

Thanks,
Lei

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Lei Zhang

Google Play

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